

Listing of the Claims

1. (Currently Amended) A method for automated management and standardization of performance information-associated with at least one business, ~~the method comprising:~~

obtaining a trial balance report containing performance information associated with a business, the performance information originating from an accounting system used by the business, and storing the ~~information~~ trial balance report as electronic data on a data processing system, the performance information in the trial balance report having a first format based on a first set of performance classifications;

converting, using an automated process executing on the data processing system, the performance information in the trial balance report from the first format to a second standardized format based at least in part on a mapping of one or more performance classifications of the first set of performance classifications to one or more respective performance classifications of a second set of standardized performance classifications;

aggregating the converted performance information with performance information associated with at least one other business, thereby creating a standardized database of private company performance information across a receiving institution's portfolio that comports with generally accepted accounting principles;

analyzing the converted performance information associated with the business based at least in part on one or more performance metrics; and

generating at least one electronic report based on the results of the analyzing for the business whose performance information was obtained.

2. (Previously Presented) The method as in Claim 1, further comprising:
generating one or more performance reports based on the analysis of the
converted performance information.
3. (Currently Amended) The method as in Claim 2, wherein the one or
more performance reports includes at least one alert indicator to identify at least
one performance metric of the converted performance information having a
variance from a corresponding predetermined value that exceeds an adjustable
threshold associated with the at least one performance metric.
4. (Original) The method as in Claim 3, wherein the predetermined value
includes a value of the performance metric from a previous period.
5. (Original) The method as in Claim 3, wherein the predetermined value
includes a target value set for the at least one performance metric.
6. (Original) The method as in Claim 3, wherein the predetermined value
includes a value representative of an industry average for the at least one
performance metric.
7. (Currently Amended) The method as in Claim 1, further comprising
the steps of:
obtaining a trial balance report containing performance information
associated with a second business, the performance information having a third
format based on a third set of performance classifications;
converting, using an automated process, the performance information
associated with the second business from the third format to the second format
based at least in part on a mapping of one or more performance classifications of
the third set of performance classifications to one or more respective
performance classifications of the second set of performance classifications; and
aggregating the converted performance information associated with the
second business with the other aggregated performance information; and

analyzing the converted performance information associated with the second business based at least in part on one or more performance metrics.

8. (Original) The method as in Claim 7, further comprising:

generating one or more performance reports based on results of the analysis of the converted performance information associated with the second business.

9. (Currently Amended) The method as in Claim 7, further comprising:

~~aggregating the converted performance information associated with the first and second businesses; and~~

analyzing at least one performance metric of at least one of the first and second businesses based on one or more representative performance metrics from the aggregated converted performance information.

10. (Currently Amended) The method as in Claim 1, wherein obtaining the ~~performance information~~ trial balance includes receiving the performance information as one or more data files uploaded via a website.

11. (Original) The method as in Claim 1, further comprising providing the one or more performance reports to at least one requesting party.

12. (Original) The method as in Claim 11, wherein the one or more performance reports are provided via a website.

13. (Original) The method as in Claim 1, wherein the conversion of the performance information from the first format to the second format is performed at least in part using one or more software programs.

14. (Original) The method as in Claim 13, wherein the performance information is converted from the first format to the second format using a conversion map indicating correlations between performance classifications of the first set of performance classifications and performance classifications of the second set of performance classifications.

15. (Original) The method as in Claim 1, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.
16. (Currently Amended) The method as in Claim 1, further comprising:
providing at least one alert to at least one requesting party, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric set by the requesting party.
17. (Original) The method as in Claim 16, wherein the predetermined value includes a value of the performance metric from a previous period.
18. (Original) The method as in Claim 16, wherein the predetermined value includes a target value set for the at least one performance metric.
19. (Original) The method as in Claim 16, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.
20. (Original) The method as in Claim 16, wherein the alert is delivered via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.
21. (Original) The method as in Claim 1, further comprising:
delivering at least a portion of the converted performance information to a requesting party as one or more data files having a format compatible with software operated by the requesting party.
22. (Original) The method as in Claim 1, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the

second set includes a financial account correlated to a financial account of the first set.

23. (Original) The method as in Claim 1, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

24. (Currently Amended) A method for automated management of performance information associated with at least one business, the method comprising:

obtaining a trial balance report containing performance information associated with a business, the performance information originating from an accounting system used by the business and including financial performance information associated with the business, as an electronic data file uploaded via a graphical user interface (GUI), the performance information in the trial balance report having a first format based on a first set of performance classifications;

converting, using at least one automated software program associated with the GUI, the performance information in the trial balance report from the first format to a second standardized format based at least in part on a mapping of the one or more performance classifications of the first set of performance classifications to one or more corresponding performance classifications of a second set of performance classifications;

aggregating the converted performance information with performance information associated with at least one other business thereby creating a standardized database of private company performance information across a receiving institution's portfolio that comports with generally accepted accounting principles;

-analyzing, using at least one automated software program associated with the GUI, the converted performance information based at least in part on one or more performance metrics; and

displaying one or more performance reports based on results of the analysis of the converted performance information via the GUI to the submitting business.

25. (Original) The method as in Claim 24, wherein the GUI includes one or more webpages of a website.

26. (Original) The method as in Claim 24, wherein the performance information is converted from the first format to the second format using a conversion map indicating correlations between performance classifications of the first set of performance classifications and performance classifications of the second set of performance classifications.

27. (Original) The method as in Claim 24, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

28. (Currently Amended) The method as in Claim 24, further comprising: providing a least one alert to at least one requesting party via the website, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric set by the requesting party.

29. (Original) The method as in Claim 28, wherein the alert is delivered from the website via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

30. (Original) The method as in Claim 24, further comprising:

delivering at least a portion of the converted performance information to a requesting party via the website as one or more data files having a format compatible with software operated by the requesting party.

31. (Original) The method as in Claim 24, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

32. (Original) The method as in Claim 24, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

33. (Currently Amended) A system for automated management of performance information associated with at least one private business, the system comprising:

means for obtaining performance information associated with a business, the performance information originating from the business' general ledger accounting system and including financial performance information of the business, the performance information having a first format based on a first set of performance classifications;

automated means for converting the performance information from the first format to a second format based at least in part on a mapping of one or more performance classifications of the first set of performance classifications to one or more performance classifications of a second set of performance classifications;
and

means for aggregating the converted information with information associated with at least one other business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles;

automated means for analyzing the converted performance information based at least in part on one or more performance metrics; and

means for generating an electronic information dashboard for visualizing results of the analysis, the dashboard detailing at least one historical trend for one or more financial metrics associated with the at least one business for the at least business.

34. (Currently Amended) The system as in Claim 33, further comprising:
automated means for generating one or more performance reports based on the results of the analysis of the converted performance information.

35. (Currently Amended) The system as in Claim 34, wherein the one or more performance reports includes at least one alert indicator to identify at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the performance metric.

36. (Original) The system as in Claim 34, wherein the predetermined value includes a value of the performance metric from a previous period.

37. (Original) The system as in Claim 34, wherein the predetermined value includes a target value set for the performance metric.

38. (Original) The system as in Claim 34, wherein the predetermined value includes a value representative of an industry average for the performance metric.

39. (Currently Amended) The system as in Claim 33, further comprising:

means for obtaining a trial balance report containing performance information associated with a second business, the performance information having a third format based on a third set of performance classifications;

automated means for converting the performance information associated with the second business from the third format to the second format based at least in part on a mapping of one or more performance classifications of the third set of performance classifications to one or more respective performance classifications of the second set of performance classifications; and

means for aggregating the converted performance information associated with the second business with the other aggregated performance information;
and

automated means for analyzing the converted performance information associated with the second business.

40. (Original) The system as in Claim 39, further comprising:

automated means for generating one or more performance reports based on results the analysis of the converted performance information associated with the second business.

41. (Original) The system as in Claim 39, further comprising:

means for aggregating the converted performance information associated with the first and second businesses; and

means for analyzing a performance of at least one of the first and second businesses based on one or more representative performance metrics from the aggregated converted performance information.

42. (Currently Amended) The system as in Claim 33, wherein the means for obtaining the ~~performance information~~ trial balance report includes a website adapted to receive the performance information as one or more uploaded data files.

43. (Original) The system as in Claim 33, further comprising means for providing the one or more performance reports to at least one requesting party.
44. (Original) The system as in Claim 43, wherein the means for providing the one or more performance reports includes a website adapted to provide the one or more performance reports as one or more webpages.
45. (Original) The system as in Claim 33, wherein the automated means for converting the performance information from the first format to the second format includes one or more software programs adapted to convert the performance information using a conversion map indicating correlations between performance classifications of the first set of performance classifications and performance classifications of the second set of performance classifications.
46. (Original) The system as in Claim 33, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.
47. (Currently Amended) The system as in Claim 33, further comprising:
means for providing at least one alert to at least one requesting party, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric that is set by the requesting party.
48. (Original) The system as in Claim 47, wherein the predetermined value includes a value of the performance metric from a previous period.
49. (Original) The system as in Claim 47, wherein the predetermined value includes a target value set for the at least one performance metric.
50. (Original) The system as in Claim 47, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.

51. (Original) The system as in Claim 47, wherein the alert is delivered via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.
52. (Original) The system as in Claim 33, further comprising:
means for delivering at least a portion of the converted performance information to a requesting party as one or more data files having a format compatible with software operated by the requesting party.
53. (Original) The system as in Claim 33, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.
54. (Original) The system as in Claim 33, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.
55. (Currently Amended) A system for automated management of performance information associated with at least one business, the system comprising:
one or more networked servers adapted to:
operate a website having one or more webpages;
obtain a trial balance report containing performance information associated with a business, including financial performance information of that business originating from a general ledger accounting system used by the business, as an electronic data file uploaded via one or more webpages of the

website, the performance information having a first format based on a first set of performance classifications;

convert the performance information from the first format to a second standardized format based at least in part on a mapping between one or more performance classifications of the first set of performance classifications to one or more respective performance classifications of the second set of performance classifications;

aggregate the converted performance information with performance information associated with at least one other business to create a standardized database of private company performance information across a receiving institution's financial portfolio that comports with generally accepted accounting principles;

analyze the converted performance information based at least in part on one or more performance metrics; and

provide one or more performance reports of results of the analysis of the converted performance information for display to the submitting business via the one or more webpages of the website.

56. (Original) The system as in Claim 55, wherein the one or more networked servers are adapted to convert the performance information using a conversion map indicating correlations between one or more performance classifications of the first set of performance classifications and one or more respective performance classifications of the second set of performance classifications.

57. (Currently Amended) The system as in Claim 55, wherein the one or more networked servers are further adapted to:

obtain a trial balance report containing performance information associated with a second business as electronic data uploaded via one or more webpages of the website, the performance information associated with the

second business having a third format based on a third set of performance classifications;

convert the performance information associated with the second business from the third format to the second format based at least in part on a mapping between one or more performance classifications of the third set of performance classifications to one or more respective performance classifications of the second set of performance classifications;

aggregate the converted performance information associated with the second business with the other aggregated performance information; and

analyze the converted performance information associated with the second business based at least in part on one or more performance metrics; and

provide for the display of one or more performance reports of results of the analysis of the converted performance information associated with the second business via the one or more webpages of the website for the second business.

58. (Original) The system as in Claim 55, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

59. (Currently Amended) The system as in Claim 55, wherein the one or more networked servers are further adapted to:

provide a least one alert to at least one requesting party via the website, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric that is set by the requesting party.

60. (Original) The system as in Claim 59, wherein the alert is delivered from the website via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

61. (Original) The method as in Claim 55, wherein the one or more networked servers are further adapted to:

deliver at least a portion of the converted performance information to a requesting party via the website as one or more data files having a format compatible with software operated by the requesting party.

62. (Original) The system as in Claim 55, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

63. (Original) The system as in Claim 55, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

64.-73. Cancelled.

74. (Currently Amended) A method for providing a benchmark analysis of performance information associated with at least one business, the method comprising:

storing performance information, including financial performance information associated with a plurality of different businesses taken from software systems used to maintains those ~~businesses~~ businesses' financial information as electronic data on a data processing system;

converting the performance information associated with each of a plurality of businesses to a first format;

aggregating at least a portion of the converted performance information of each of the plurality of businesses;

identifying one or more representative performance metrics representative of the plurality of businesses based at least in part on an analysis of the aggregated performance information;

benchmarking performance information associated with a first business based at least in part on a comparison of the performance information associated with the first business with at least one of the one or more representative performance metrics of the aggregated information; and

generating at least one electronic report illustrating the results of the benchmarking.

75. (Original) The method as in Claim 74, further comprising converting the performance information associated with the first business to the first format and wherein the converted performance information associated with the first business is compared with the at least one of the one or more representative performance metrics.

76. (Original) The method as in Claim 74, further comprising generating one or more performance reports based at least in part on results of the comparison of the performance information associated with the first business with the at least one representative performance metric.

77. (Currently Amended) The method as in Claim 74, wherein the one or more performance reports includes at least one alert indicator to identify at least one performance metric of the performance information associated with the first business that has a variance from a corresponding representative performance metric that exceeds an adjustable threshold associated with the performance metric.

78. (Original) The method as in Claim 74, wherein at least one of the steps of converting, aggregating, identifying and analyzing are performed at least in part using one or more automated software programs.
79. (Original) The method as in Claim 74, wherein at least one business of the plurality of businesses is a private business.
80. (Original) The method as in Claim 79, wherein the first business is a private business.
81. (Original) The method as in Claim 79, wherein the first business and the plurality of businesses have one or more business classifications in common.
82. (Original) The method as in Claim 79, wherein the one or more business classifications include at least one of a group consisting of: a similar industry type; a similar size; a similar revenue; a similar asset value; a same business entity type; a similar stage of maturity; and a similar geographical location.
83. (Original) The method as in Claim 79, wherein the performance information includes financial information and where one or more of the performance classifications includes a financial account.
84. (Original) The method as in Claim 79, wherein the performance information includes operational information and where one or more of the performance classifications includes an operational classification.
- 85.-89. Cancelled.
90. (Previously Presented) A system for providing a benchmark analysis of performance information associated with a business, the system comprising:
a database having performance information associated with a plurality of businesses, including financial performance information originating from general ledger accounting software used to maintain those businesses' books, the performance information having a first format based on a first set of performance classifications;

automated means for identifying one or more representative performance metrics representing the plurality of businesses based at least in part on an analysis of the performance information of the database; and

automated means for benchmarking performance information associated with a first business based at least in part on a comparison of the performance information of the first business with at least one of the one or more representative performance metrics.

91. (Original) The system as in Claim 90, further comprising automated means for generating one or more performance reports based at least in part on results of the comparison of the performance information associated with the first business with the at least one representative performance metric.

92. (Original) The system as in Claim 91, further comprising means for providing the one or more performance reports for display via one or more webpages of a website.

93. (Original) The system as in Claim 90, further comprising automated means for converting the performance information associated with the first business from a second format based on a second set of performance classifications to the first format.

94. (Original) The system as in Claim 90, wherein the each business of the plurality of businesses is a private business.

95. (Original) The method as in Claim 94, wherein the first business is a private business.

96. (Original) The system as in Claim 90, wherein the first business and the plurality of businesses have one or more business classifications in common.

97. (Original) The method as in Claim 90, wherein the one or more business classifications include at least one of a group consisting of: a similar industry type; a similar size; a similar revenue; a similar asset value; a same

business entity type; a similar stage of maturity; and a similar geographical location.

98. (Original) The method as in Claim 90, wherein the performance information includes financial information and where one or more of the performance classifications includes a financial account.

99. (Original) The method as in Claim 90, wherein the performance information includes operational information and where one or more of the performance classifications include an operational classification.

100. (Currently Amended) A method for automated management of private company performance information ~~associated with at least one business~~, the ~~method~~ comprising:

obtaining a trial balance containing performance information associated with a ~~business~~ private business, the ~~performance information~~ trial balance comprising data taken from that business' general ledger accounting system and having a user-defined format;

converting, using an automated process executing on a data processing system, the performance information contained in the trial balance from the user-defined format to a standardized format based at least in part on a mapping process; and

aggregating the converted performance information with performance information associated with at least one other business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles;

analyzing the converted performance information based at least in part on one or more performance metrics; and

generating at least one electronic report based on the analyzing, wherein generating a report comprises generating a web page based analysis dashboard for visualizing results of the analyzing, the dashboard detailing at least one historical trend for one or more performance metrics associated with the business for the private business.

101. (Currently Amended) A network-based business performance information management system comprising:

a computer system accessible on a computer network and adapted to:

electronically receive at least one business performance information file from at least one business, the business performance information file containing financial statement information on the at least one business in first format specified by that business;

convert the information in the at least one business performance information file into a standardized format using a mapping process;

~~store~~ aggregate the information with converted business performance information of at least one other business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles; and

analyze the converted performance information based at least in part on one or more performance metrics; and

generate an alert if results of analyzing indicates that at least one performance metric of the converted performance information varies from a corresponding predetermined value by more than an adjustable threshold set by a recipient of the alert.

102. (Currently Amended) A method for gathering private company business performance information comprising:

electronically receiving a file containing trial balance information associated with a business in a first format at a remote computer system over the Internet;

converting the data in the file from the first format to a second standardized format using an automated conversion mapping process;

~~storing aggregating~~ the converted data in a database with converted data of other ~~businesses~~ private companies thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles; and

analyzing the converted performance information based at least in part on one or more performance metrics; and

generating at least one report based on the results of analyzing for the submitting business.